

## Case 3 – Catherine S.

Catherine S. is eighty-six-years-old. She is a widow, living on Social Security and a teacher's pension. She has had several health problems. Two winters ago, she fell and broke her hip under circumstances that she's never entirely explained. She recovered and doesn't seem to have fallen again.

Catherine's two sons live in Seattle; her daughter lives in Anchorage. Catherine lives in a house outside Palmer that her husband built forty years ago. She and her husband raised their family there. The house is isolated; the nearest neighbor is a quarter mile away. Catherine is determined to remain in the house for the rest of her life. Until recently she could arrange for snow-plowing and occasional repairs to the house, but last winter her arrangements fell apart and she was alone in the house for long periods of time.

The phone service was turned off twice because she hadn't paid the bill. The house also now needs extensive repairs to the roof and windows. Catherine won't acknowledge the need for the repairs. She probably doesn't have enough savings to cover them.

Catherine still drives but now she only takes the car as far as the nearest grocery store, about five miles away, and to her church in Palmer on Sundays. Catherine's daughter tries to visit her once a week, and she arranges to take her to Anchorage when necessary for medical appointments or other errands. Catherine

no longer trusts her doctors and the daughter has resorted to lying to get her mother to appointments.

The daughter has noticed that her mother often forgets what day it is. She also repeats herself continuously. She no longer reads much. The daughter suspects that more bills aren't being paid and that her tax returns haven't been filed. She doesn't know what happened with last year's Permanent Fund Dividend. She doubts that her mother applied for the dividend this year. Because her mother becomes angry when questioned about these matters, the daughter isn't certain. The condition of the house and Catherine's isolation have become constant points of argument between Catherine and her daughter.

The daughter is divorced, with three children – four, six, and seven-years-old. She works as a secretary for a utilities company. She is taking classes at the university to complete her business degree. It is very difficult for her to make the trip to Palmer each week, especially in the winter.

Earlier this month Catherine became disoriented while she was at the grocery store. She couldn't remember where she had parked her car and didn't seem to know where she was. When a woman noticed her confusion, and tried to help her, she insisted that the woman call her son – in Seattle. Catherine couldn't remember the phone number, however, and she wasn't willing to let the woman look in her purse. Eventually the woman contacted the police, who took Catherine to the hospital.

In the hospital Catherine became even more disoriented and angry. She still refused to let anyone look into her purse. The emergency room doctor admitted her for observation. Eventually a nurse was able to find the daughter's phone number and contact her.

After doing some tests, the doctor has made a preliminary diagnosis of possible dementia and recommended further testing in six months.

The brothers in Seattle have suggested that the daughter and her children move into the family house in Palmer to care for Catherine. The daughter doesn't want to do this, but she knows her mother will have even more trouble in the coming winter. She wants her mother to move to Anchorage. She has begun to think about being appointed guardian.

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## **Study Questions**

- Does the daughter see an increase in the number of incidents in which her mother seems unable to care for herself?
- Are there signs that Catherine isn't eating well or taking care of her hygiene?
- Can Catherine explain herself clearly? Can she describe what is happening around her accurately?

- Is the daughter keeping a record of incidents such as the time in the grocery store when her mom became disoriented or the times that the phone was turned off?
  - Has either of the brothers visited recently? Do they notice any deterioration in the mother's capacities?
  - Do the daughter and the sons communicate regularly? Do they communicate honestly and openly?
  - Does anyone have a power of attorney? Durable power of attorney for health care? A will?
  - What is the state of the daughter's health and well-being?
  - What would be the daughter's plan if she were appointed guardian?
  - Is there any evidence that Catherine is a victim of fraud or exploitation?
  - Does Catherine have friends in either Palmer or Anchorage whom she enjoys seeing? Are there other relatives?
  - Does Catherine show interest in her grandchildren?
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## **Catherine S. Case Conclusion**

When Catherine's daughter learned about the guardianship process, she began keeping a journal noting incidents when her mother showed herself unable to make clear decisions. Over a period of several months, there were more occasions when Catherine seemed confused about where she was and more occasions in which she was unable to explain herself clearly.

Catherine wasn't willing to let her daughter sort out her finances but she did agree to let one of her sons look through her paperwork when he visited from Seattle. The son discovered that Catherine had lost control of her checkbook but there was no evidence of any fraud. He straightened out the checking account.

While her brother was visiting, Catherine told him that she wasn't willing to move to Palmer. She was willing to assume guardianship if her mother could live in Anchorage and if the house could be sold to help cover expenses. The brother was initially reluctant to sell the house, but after a time he agreed. He also agreed to organize the necessary repairs if his mother would agree to the sale. Catherine, however, refused even to talk about selling the house. She became extremely angry and almost incoherent when they mentioned the possibility.

As the winter approached, the daughter made arrangements for a neighbor to check on her mother each day. The next doctor's evaluation showed more deterioration in her mother's mental and physical capacities.

After further discussion with both her brothers, the daughter completed the court petition. She requested that she be appointed guardian. One brother would serve as conservator, with particular responsibility for selling the house in order to cover their mother's future expenses. The court granted the petition under these terms. The daughter moved her mother to an assisted living facility in Anchorage, where she could visit a couple of times each week, bringing the grandchildren with her. Her mother resisted the

move but given the realities of the situation, there was no other workable arrangement.